

**PUBLIC EMPLOYEES' RETIREMENT SYSTEM**  
**PERS-HRD-88 (Rev. 7/89) (PC)**  
**POSITION DUTY STATEMENT**

Title of Position  
**Workforce Planning & Leadership Development Coordinator**  
 Req #4619/MSA

Division and/or Subdivision  
**Human Resources Division/All Staff Training and Development**

**INSTRUCTIONS:** The Executive Officer is required by Government Code Section 18805 to report (or to record) "... material changes in the duties of any position in his jurisdiction." The Position Duty Statement is used for this purpose. Enter identifying information and effective date at the right. Enter brief description of each of the important duties and responsibilities of the position below. Group related duties in numbered paragraphs and indicate the proportion of total work time occupied. Prepare copies for employee assigned to the position and his/her supervisor.

Location of Headquarters  
 400 Q Street  
 Sacramento, CA 95814

Class Title of Position  
 Staff Services Manager II

Position Number  
 330-4801-xxx

Effective Date  
 August 1, 2007

Percent of  
 Time  
 Required

Under the general direction of the Assistant Chief of Human Resources, the Staff Services Manager II is assigned specifically to the Succession Planning, Workforce Management and Leadership Development Programs. The SSM II plans, develops, organizes, coordinates and conducts various components of the Succession Planning framework, including but not limited to: the 360°Leadership Feedback Program, Leadership Acceleration Workshop, Leadership Skills Assessment, Workforce Planning Workshop, and other leadership development courses/workshops. They also provide for day-to-day management direction over the CalPERS Leadership Development Program.

30%

Serves as the Succession Planning & Workforce Management Program (SPWMP) Coordinator. This includes day-to-day maintenance of the project plans, developing messages detailed in the project communication plan, and managing all the details around specific components of the SPWMP Framework. This includes working with all levels of management on various components to ensure integration of SPWMP project goals and objectives in each division's annual planning business objectives. Provides administration and support of the 360°Leadership Feedback Program, Leadership Acceleration Workshop, Leadership Skills Assessment, Workforce Planning Workshop, and other leadership development courses/workshops. This includes coordinating with the site administrators for the external, web-based assessment process and action planning follow-through sites; scheduling groups of leaders for the 360° survey process; coordinating the selection process for coaches and establishing coaching assignments; coordinates the arrangements for all 360° Leadership Feedback "orientation" workshops and Report "Feed Forward" Feedback Sessions. Coordinate with senior management and executive (Business Learning Council) in developing, organizing, and monitoring developmental opportunities for leaders. Oversight of the development and maintenance of workforce, Leadership Skills Assessment, and other SPWMP databases. Report periodically to senior management and executive as to the status of SPWMP activities and deliverables. Coordinates and oversees the development of the annual report to senior management, executive, and Board of Administration of SPWMP activities. Spokesperson and representative of the SPWMP at internal and external conferences, workshops, meetings, taskforces, etc.

30%

Manage the training curriculum development and enrollment process for the Leadership Development Program with responsibility for addressing CalPERS ongoing training needs. Contribute toward the development of an organizational budget and training plan. Provide consultation to managers, supervisors and others regarding leadership development programs, training methods, best practices, alternatives, training budgets and training policy. Provide guidance to CalPERS leadership regarding issues related to training, skills assessments, training resource options, and program evaluations. Integrate leadership development projects with CalPERS' goals, priorities and strategies. Plan, direct, and evaluate the activities of training staff responsible for: developing, coordinating, presenting and evaluating in-service training programs; identifying, evaluating, obtaining, and coordinating other training resources; recording and providing training information history and statistical information; participating in, and providing training guidance and support to, cross-functional teams. Ensure leaders receive appropriate training, development and direction so that high quality work performance and timely results are achieved.

30%

Through a subordinate SSM I, directs the functions of the Business Operations Unit which include: administrative services such as budgets, contracts, HR personnel liaison, and business continuity coordinator; and technical services which include the administration of PeopleSoft Human Resources Management System; maintenance and development of all Human Resources Web Sites, and overall technical support for the Human Resources Division which includes data processing equipment, telecommunications, and facility planning.

10%

Provides ongoing consultation (confidential at times) to division managers and supervisors regarding the SPWMP. Helps identify resources for leadership training development.

**PUBLIC EMPLOYEES' RETIREMENT SYSTEM**  
**PERS-HRD-88 (Rev. 7/89) (PC)**  
**POSITION DUTY STATEMENT**

Title of Position  
 Staff Services Manager I  
 Reg #4879/MSA

Division and/or Subdivision  
 Human Resources Services Division/Workforce  
 Management and Leadership Programs

**INSTRUCTIONS:** The Executive Officer is required by Government Code Section 18805 to report (or to record) "... material changes in the duties of any position in his jurisdiction." The Position Duty Statement is used for this purpose. Enter identifying information and effective date at the right. Enter brief description of each of the important duties and responsibilities of the position below. Group related duties in numbered paragraphs and indicate the proportion of total work time occupied. Prepare copies for employee assigned to the position and his/her supervisor.

Location of Headquarters  
 400 P Street  
 Sacramento, CA 95814

Class Title of Position  
 Staff Services Manager I

Position Number  
 275-330-4800-007 (HRMS #2511)

Effective Date  
 11/09/07

Percent of  
 Time  
 Required

Under the general direction of the Staff Services Manager II, Leadership & Operations Support Unit Manager, the Staff Services Manager I is assigned specifically to the Workforce Management & Leadership Programs. The SSM I plans, develops, organizes, coordinates and conducts various components of the Workforce Management & Leadership Programs (WMLP), including but not limited to, the 360° Leadership Feedback Program, Leadership Skills Assessment, Leadership Acceleration Workshop, Workforce Management, Progressive Leadership Series, and other Leadership Development.

35%

Provides management and supervision to professional staff. Duties include day-to-day maintenance of the program plan and schedule, communication plan, and manage all specific components of the WMLP. Duties also include working with all levels of management on various components to ensure integration of WMLP goals and objectives into each division's annual business planning process.

35%

Provides management, administration, and support of the succession planning components including the 360° Leadership Feedback Program, Leadership Acceleration Workshop, Business Learning Council, and the Leadership Skills Assessment process. This includes coordinating with WMLP staff; site administrators for the external, web-based assessment process and action planning follow-through sites; scheduling groups of leaders for the 360° survey process; coordinating the selection process for coaches and establishing coaching assignments. Coordinates the arrangements for all 360° Leadership Feedback "orientation" workshops and Report "Feed Forward" Feedback Sessions. Provides ongoing consultation to division managers and supervisors regarding the 360° Leadership Feedback and the Leadership Skills Assessment Processes. Helps identify resources for leadership training development.

20%

Leads the planning, development and maintenance, and implementation of the Progressive Leadership Series and other leadership workshops. Coordinate with senior/executive management in identifying leadership development aligned to support the strategic plan and business needs.

10%

Contributes toward the development of WMLP annual budget and training plan. Provide consultation to managers, supervisors and others regarding leadership development programs, best practices, skills assessments, training methods, resource options and alternatives, program evaluations, training budgets and training policy. Provide resources to and develop WMLP staff to support them in their role and responsibilities. Represent WMLP on internal and external committees and workshops.

**PUBLIC EMPLOYEES' RETIREMENT SYSTEM**  
**PERS-HRD-88 (Rev. 7/89) (PC)**  
**POSITION DUTY STATEMENT**

Title of Position  
**Training Manager**

Division and/or Subdivision  
**Human Resources Division/All Staff Training and Development**

**INSTRUCTIONS:** The Executive Officer is required by Government Code Section 18805 to report (or to record) "... material changes in the duties of any position in his jurisdiction." The Position Duty Statement is used for this purpose. Enter identifying information and effective date at the right. Enter brief description of each of the important duties and responsibilities of the position below. Group related duties in numbered paragraphs and indicate the proportion of total work time occupied. Prepare copies for employee assigned to the position and his/her supervisor.

Location of Headquarters  
 400 P Street  
 Sacramento, CA 95814

Class Title of Position  
 Staff Services Manager I (Limited-term)

Position Number  
 158-5197-002

Effective Date  
 1/1/05

Percent of  
 Time  
 Required

Under the general direction of the Staff Services Manager III, All Staff Training and Development (ASTD) Unit Manager, the Staff Services Manager I (limited-term) is assigned specifically to the Succession Planning and Management Project. The SSMI plans, develops, organizes, coordinates and conducts various components of the Succession Planning framework, including but not limited to, the 360° Leadership Feedback Program and the Leadership Skills Assessment.

50%

Serves as the Succession Planning & Management Project (SPMP) Coordinator. This includes day-to-day maintenance of the project plan and schedule, the project communication plan, and managing all planning of specific components of the SPMP Framework. This includes working with all levels of management on various components to ensure integration of SPMP project goals and objectives into each division's annual business planning process.

30%

Provides administration and support of the Succession Planning components including the 360° Leadership Feedback Program and the Leadership Skills Assessment process. This includes coordinating with the site administrators for the external, web-based assessment process and action planning follow-through sites; scheduling groups of leaders for the 360° survey process; coordinating the selection process for coaches and establishing coaching assignments. Coordinates the arrangements for all 360° Leadership Feedback "orientation" workshops and Report "Feed Forward" Feedback Sessions.

10%

Provides ongoing consultation to division managers and supervisors regarding the 360° Leadership Feedback and the Leadership Skills Assessment Processes. Helps identify resources for leadership training development.

10%

Contributes toward the development of Succession Planning & Management project budget and training plan. Provide consultation to managers, supervisors and others regarding leadership development programs, best practices, skills assessments, training methods, resource options and alternatives, program evaluations, training budgets and training policy.

Date: May 14, 2004

**PUBLIC EMPLOYEES' RETIREMENT SYSTEM**

PERS-HRD-88 (Rev. 7/89) (PC)

**POSITION DUTY STATEMENT**

Transaction ????

Title of Position  
**Training Officer I**Division and/or Subdivision  
**Human Resources Division/All Staff Training and Development/Succession Planning Unit**

**INSTRUCTIONS:** The Executive Officer is required by Government Code Section 18805 to report (or to record) "... material changes in the duties of any position in his jurisdiction." The Position Duty Statement is used for this purpose. Enter identifying information and effective date at the right. Enter brief description of each of the important duties and responsibilities of the position below. Group related duties in numbered paragraphs and indicate the proportion of total work time occupied. Prepare copies for employee assigned to the position and his/her supervisor.

Location of Headquarters  
400 Q Street  
Sacramento, CA 95814Class Title of Position  
Training Officer IPosition Number  
275-330-5197-014Effective Date  
10/05/06Percent of  
Time  
Required

Under the general direction of the Staff Services Manager I, All Staff Training and Development (ASTD) Unit, the Training Officer I (TO) is assigned specifically to the Succession Planning and Workforce Management Program (SPWMP). The TO plans, develops, organizes, coordinates and conducts various components of the Succession Planning framework, including but not limited to, the 360° Leadership Feedback Program, the Leadership Skills Assessment, and Work Force Management Program.

50%

Collect and analyze organizational statistics and demographics in order to identify trends to develop reports to assist in succession planning and workforce management. Day-to-day maintenance of the SPWMP program plan schedule, the communication plan, and execution of specific components of the SPWMP Framework. This includes working on various tasks and responsibilities to ensure integration and proper execution of SPWMP goals and objectives in each division's annual business planning process. Apply project management skills and tools (work break-down structure, risk management, resource loading, communication plan, define requirements, etc.) to new related projects and program deliverables.

30%

Provides administration, support, data collection and analysis of the Succession Planning components including the 360° Leadership Feedback Program, the Leadership Skills Assessment process, and Work Force Management Program. This includes coordinating with external administrator(s) and vendors who oversee the web-based assessment process and action planning follow-through websites; scheduling groups of leaders for the 360° survey process; coordinating the selection process for coaches and establishing coaching assignments. Coordinates the arrangements for all 360° Leadership Feedback "Orientation" workshops, Report "Feed Forward" Feedback Sessions, and other necessary workshops/sessions. Facilitates and presents at various workshops/sessions. Gathers data, analyzes, and creates reports on program performance and organizational demographics.

10%

Helps identify and contract for resources providing leadership training development.

10%

Tracks expenditures and invoices of the Succession Planning & Management Program budget. Provides consultation to managers, supervisors and others regarding leadership development programs, best practices, skill assessments, training methods, resource options and alternatives, program evaluations, training budgets and training policy.

**Use additional sheet(s) if necessary**